

Raisin Situation in Selected Countries

Raisin production is expected to fall by 10 percent to 497,183 metric tons in 1999/2000 for selected Northern Hemisphere countries. Production in Greece, Turkey and Mexico is estimated to decline by 19 percent, 24 percent and 32 percent, respectively in 1999/2000. The United States is the only Northern Hemisphere country expected to post an increase in 1999/2000, with production forecast at 267,183 tons, up 6 percent from 1998/99.

Northern Hemisphere

United States

Raisin production in the United States is estimated at 267,183 metric tons in marketing year 1999/2000 (August 1999-July 2000), a slight increase from the 1998/99 crop. According to the industry, the 1999/2000 crop had large and full grape bunches but the grape bunch count was also one of the smallest recorded, 30 percent less than in 1998/99. The small 1998/99 raisin crop combined with strong domestic and international demand is expected to raise the price of raisins in the 1999/2000 marketing year.

Exports and imports in 1999/2000 are estimated to remain unchanged from 1998/99. Exports and imports are forecast at 112,000 and 25,000 tons, respectively, both up 1 percent from the previous year. In 1998/99, exports fell by 8 percent from the previous year to 110,688 tons. US raisin imports more than doubled in 1998/99 to reach 24,750 tons. The largest market for US raisins was Japan, which purchased a record 30,101 tons. Other important markets for US raisins in 1998/99 were the United Kingdom and Canada. In 1998/99, the United States primarily imported raisins from Mexico, Chile and Afghanistan. Imports from Afghanistan rose from 351 tons in 1997/98 to 4,287 tons in 1998/99.

Turkey

After two consecutive excellent crops and record highs, production in 1999/2000 is estimated at 190,000 metric tons, down 24 percent from the previous year. Crop disease and hail in some grape producing areas resulted in a smaller crop.

As a result of the smaller raisin crop, Turkey's raisin exports are expected to decrease by 8 percent in 1999/2000 to 180,000 tons. Virtually all raisin exports are destined for industrial uses rather than direct consumption. Germany, Italy, the Netherlands and the United Kingdom are Turkey's major export markets for raisins.

Greece

Raisin production in Greece is estimated to decline by 19 percent to 25,000 tons in 1999/2000 due to unfavorable weather conditions during the summer of 1999, as well as wet weather during the drying period in September 1999. In addition, a plant disease outbreak will also affect the quality and quantity of the output in 1999/2000.

A smaller crop in 1999/2000 is expected to raise imports 400 percent to 1,500 tons, despite a small decline in domestic consumption. Exports are estimated at 26,000 tons, unchanged from the previous year. However, the level of exports will depend on the prices offered by competitors and Turkey has entered the 1999/2000 marketing year with cheaper export prices and with a relatively better quality product. In 1998/99, 45 percent of raisin exports were destined for Germany, followed by the U.K., France, Holland and Italy.

Mexico

Raisin production in Mexico for the 1999/2000 marketing year is forecast down 32 percent to 15,000 tons. Adverse weather during the drying season led to a significant reduction in the quantity and quality of output.

Poor raisin quality is expected to affect exports. Raisin exports are forecast at 5,000 tons in 1999/2000, down 62 percent from the previous year. As usual, the highest quality production is expected to be exported, mainly to the United States, with the rest packaged for domestic consumption or used by the domestic baking and food processing industries. Imports are expected to decline by 22 percent as a result of a larger domestic supply of raisins. Chile remains the main raisin supplier to the Mexican market.

Southern Hemisphere

South Africa

South Africa's raisin production has been revised up 9 percent in 1998/99 to 40,358 tons, as a result of favorable weather conditions and the availability of greater information. Despite some frosts and late rains this past winter, the industry forecasts the 1999/2000 raisin crop to reach 38,000 tons.

Raisin exports in 1998/99 are estimated to reach 30,000 tons. Raisin exports in 1997/98 were revised downwards to correct an error found in official trade numbers. Major markets include the United Kingdom, Canada, the Netherlands and France.

Australia

Raisin production for 1998/99 was revised down by 12 percent from an earlier forecast of 23,500 tons to 20,700 tons due to adverse weather. The reduced production has sharply limited export availability and will increase pressure for additional imports. Consequently, exports for 1998/99 are expected to reach the record low level of 5,700 tons. Imports are expected to increase to 13,500 tons.

Beginning with the 1998/99 crop, the Australian Dried Fruit Board (ADFB) will no longer set the export price for sultanas and raisins. The price for the 1997/98 season was set at US \$1,675 per ton.

(The FAS Attache Report search engine contains reports on the Dried Fruit industries for 8 countries, including South Africa, Turkey and Australia. For information on production and trade, contact Karina Ramos at 202-720-6877. For information on marketing contact Kelly Strzelecki at 202-690-1341)

RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION
Marketing Years 1996/97 - 1999/2000

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Exports	Domestic Consumption 2/	Ending Stocks
METRIC TONS						
NORTHERN HEMISPHERE						
Greece						
1996/1997	1,930	33,000	500	28,500	3,000	3,930
1997/1998	3,930	35,000	1,000	33,000	3,700	3,230
1998/1999	3,230	31,000	300	26,000	4,200	4,330
1999/2000	4,330	25,000	1,500	26,000	3,800	1,030
Turkey						
1996/1997	22,872	200,000	8,296	163,895	52,000	15,273
1997/1998	15,273	240,000	3,090	192,770	37,000	28,593
1998/1999	28,593	250,000	3,000	196,220	40,000	45,373
1999/2000	45,373	190,000	3,000	180,000	35,000	23,373
Mexico						
1996/1997	0	16,000	8,000	10,000	14,000	0
1997/1998	0	18,000	6,130	7,265	16,865	0
1998/1999	0	22,000	4,474	13,142	13,332	0
1999/2000	0	15,000	3,500	5,000	13,500	0
United States						
1996/1997	123,373	282,588	11,684	117,816	209,889	89,940
1997/1998	89,940	388,729	11,194	120,614	222,976	146,273
1998/1999	146,273	251,290	24,750	110,688	213,415	98,210
1999/2000	98,210	267,183	25,000	112,000	179,393	99,000
Total Northern Hemisphere						
1996/1997	148,175	531,588	28,480	320,211	278,889	109,143
1997/1998	109,143	681,729	21,414	353,649	280,541	178,096
1998/1999	178,096	554,290	32,524	346,050	270,947	147,913
1999/2000	147,913	497,183	33,000	323,000	231,693	123,403
Australia						
1996/1997	17,720	24,750	8,518	15,029	31,959	4,000
1997/1998	4,000	38,500	11,481	14,465	32,216	7,300
1998/1999	7,300	20,700	13,500	5,700	32,500	3,300
1999/2000	NA	NA	NA	NA	NA	NA
Chile						
1996/1997	1,820	33,000	0	28,279	3,500	3,041
1997/1998	3,041	27,820	0	27,017	3,500	344
1998/1999	344	27,500	0	24,500	3,100	244
1999/2000	NA	NA	NA	NA	NA	NA
South Africa						
1996/1997	15,588	38,889	0	30,183	13,988	10,306
1997/1998	10,306	27,063	0	20,200	11,425	5,744
1998/1999	5,744	40,358	0	30,000	12,422	3,680
1999/2000	NA	NA	NA	NA	NA	NA
Total Southern Hemisphere						
1996/1997	35,128	96,639	8,518	73,491	49,447	17,347
1997/1998	17,347	93,383	11,481	61,682	47,141	13,388
1998/1999	13,388	88,558	13,500	60,200	48,022	7,224
1999/2000	NA	NA	NA	NA	NA	NA
Grand Total						
1996/1997	183,303	628,227	36,998	393,702	328,336	126,490
1997/1998	126,490	775,112	32,895	415,331	327,682	191,484
1998/1999	191,484	642,848	46,024	406,250	318,969	155,137
1999/2000	NA	NA	NA	NA	NA	NA

1/ Northern Hemisphere marketing years begin August 1, and September 1 in Turkey. Marketing years for Southern

Hemisphere raisins, (which are harvested early in the second of the split years shown) begin Jan. 1, and March 1 in Australia

2/ Domestic consumption figures include raisins used for feed and distillation purposes. 3/ imports include currants. U.S.

production data have been converted to a packed weight basis in order to align them with the other supply and distribution statistics.

Sources: U.S. Agricultural Attaches, USDA/NASS estimates, U.S. Bureau of the Census and Industry sources.

U.S. EXPORTS OF RAISINS
MARKETING YEARS (August/July) 1994/95-1998/99

Destination	1994/95	1995/96	1996/97	1997/98	1998/99
METRIC TONS					
North America					
Canada	10,946	10,447	11,463	11,973	12,121
Mexico	498	587	1,572	1,167	896
Subtotal	11,444	11,034	13,035	13,140	13,017
European Union					
Sweden	5,188	4,317	4,570	4,693	4,368
Finland	3,345	2,078	2,142	2,119	2,270
Denmark	5,242	5,631	5,286	5,469	5,148
United Kingdom	27,824	27,630	24,867	26,270	22,195
Netherlands	3,562	3,273	3,271	3,820	3,471
France	210	438	402	679	669
Germany	8,184	9,210	5,943	7,191	5,092
Spain	715	420	584	666	587
Belgium-Lux.	2,862	2,778	2,162	1,438	926
Other	339	357	437	607	517
Subtotal	57,471	56,132	49,664	52,952	45,243
Asia					
Singapore	3,272	3,570	3,704	2,585	2,776
Malaysia	1,986	1,454	1,689	1,218	686
Korea, Republic of	3,702	2,142	2,192	2,175	1,654
Hong Kong	4,163	4,993	3,780	4,344	1,763
Taiwan	3,552	3,889	4,034	4,524	3,896
Japan	24,527	25,038	27,069	23,822	30,101
Subtotal	41,202	41,086	42,468	38,668	40,876
Other Countries					
New Zealand	1,462	1,395	1,522	1,269	2,309
Norway	2,318	2,337	2,572	1,993	1,312
All Others	6,966	6,640	8,555	12,593	11,552
Grand Total	120,863	118,624	117,816	120,614	110,688

Source: U.S. Bureau of the Census

U.S. IMPORTS OF RAISINS
MARKETING YEARS (August/July) 1994/95-1998/99

Origin	1994/95	1995/96	1996/97	1997/98	1998/99
METRIC TONS					
Canada	152	9	3	1	0
Mexico	5,543	8,370	5,725	6,612	10,868
Sweden	0	0	0	0	0
Greece	0	0	0	4	108
Switzerland	0	0	17	0	0
Turkey	1,863	1,727	332	191	1,373
Afghanistan	1	112	590	351	3,030
Pakistan	41	32	115	329	169
China	20	0	2	0	15
India	0	2	0	2	0
Argentina	97	131	302	414	891
Chile	2,316	1,724	3,351	2,151	2,277
South Africa	115	0	1,021	1,080	448
Australia	0	0	21	0	2
New Zealand	0	0	0	0	0
All Others	0	0	296	59	232
Grand Total	10,148	12,107	11,775	11,194	19,413

Source: U.S. Bureau of the Census.